

Purpose

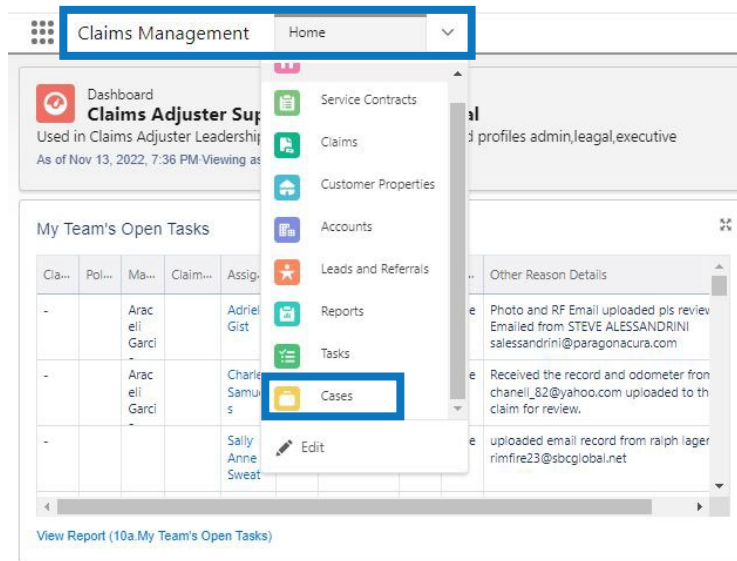
This SOP is intended to outline the new process on how to access, returned inspection, web claims and estimates sent from repair facilities for claims.

Teams Impacted

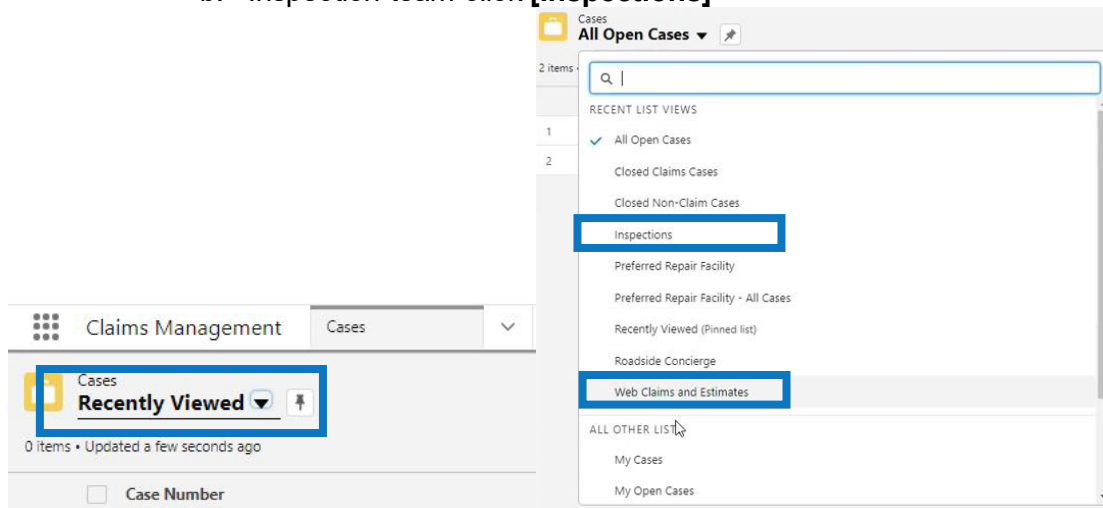
- Small Claims
- Inspections team

Procedure

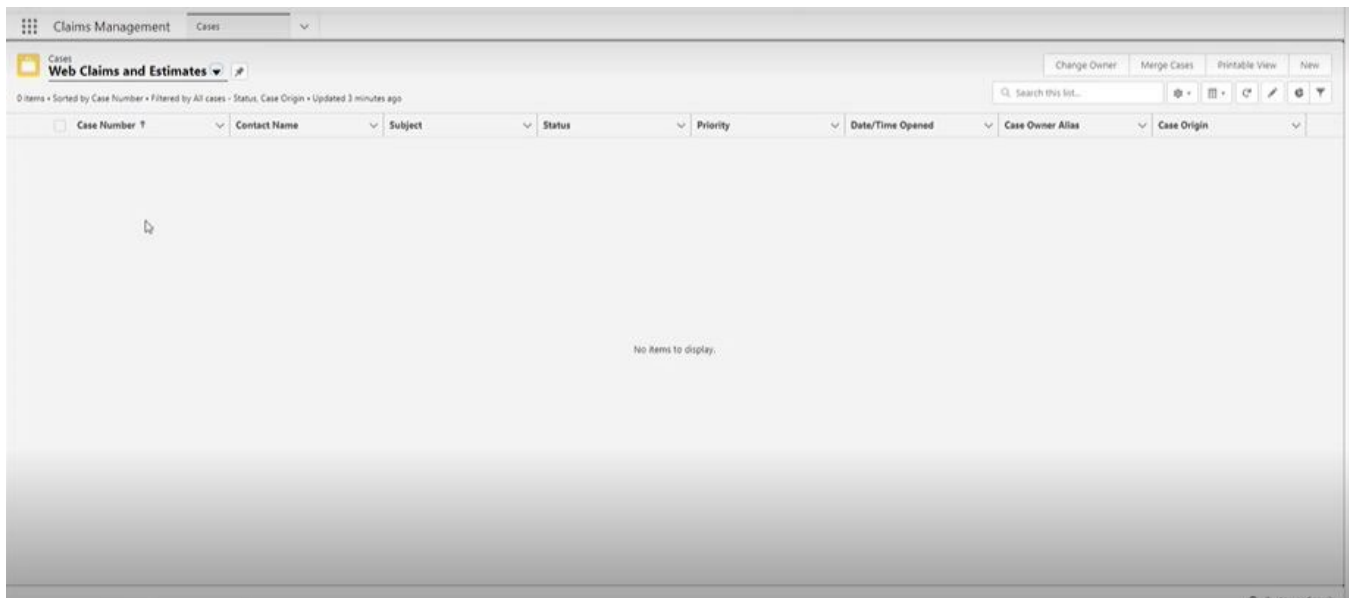
1. To start processing web claims, finding estimates submitted or locating returned inspection, click **[Claims Management]** drop down menu arrow and then selecting **[Cases]**



2. Now that you have the Cases screen pulled up click **[Recently Viewed]** and then select:
 - a. Small claims click **[Web claims and Estimates]**
 - b. Inspection team click **[Inspections]**



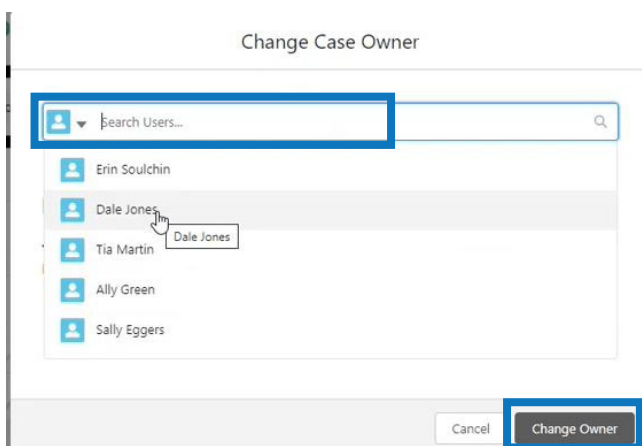
3. Here is where you will find all the claims filed online, estimates sent in for Powertrain claims and Inspections. ***** You're to work from oldest to newest and will be tracked. *****



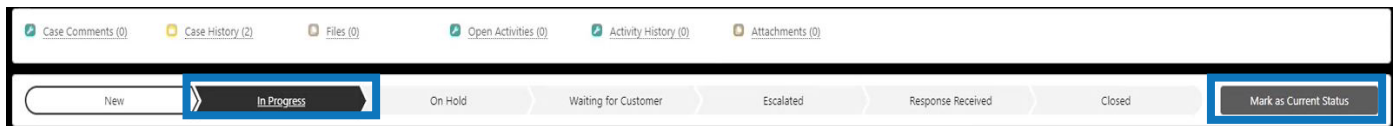
4. Determining a documents origin of where the file was sent from and how it should be processed on the far right of the screen.
- Web Claim (Online claims submission)
 - Estimates (Current powertrain claim estimate from repair facility)

	Case Number ↑	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owner Alias
1	<input type="checkbox"/> 00001025		Testing to web claims	New	Medium	11/8/2022, 12:47 PM	Web Claims
2	<input type="checkbox"/> 00001026		Testing Estimates	New	Medium	11/8/2022, 12:48 PM	Estimates

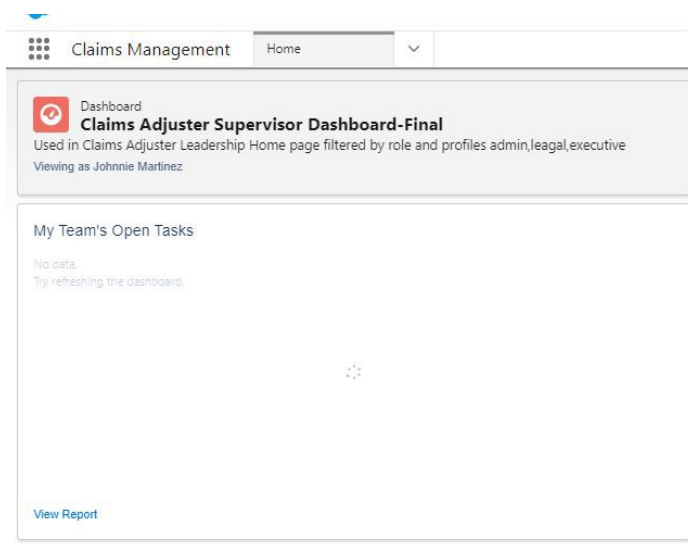
5. Selected your file by clicking on the **[Subject]**. Now that you have the file open reassign the file to yourself by clicking **[Case Owner]**, enter your name and reassign to you.



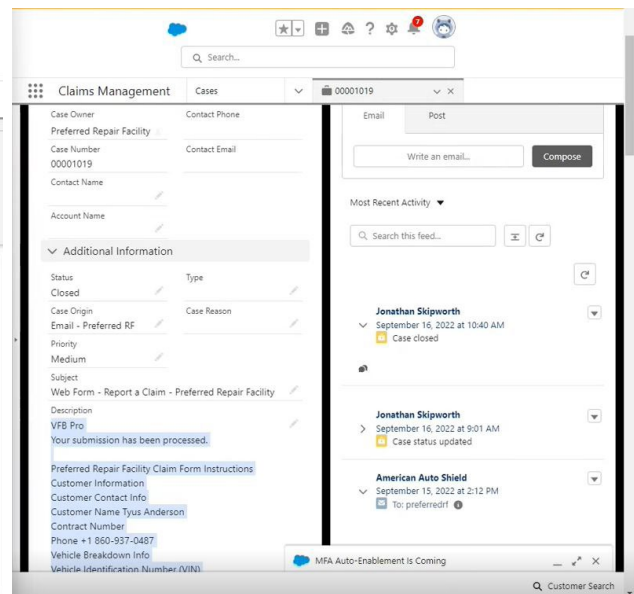
6. At the top of the screen, you need to click **[In Progress]** and then click **[Mark Status]** to let the others know you're working that file.



7. You will need to have two CMS programs open at once.
- Frist screen will be CMS to process claim. (See figure 1 below)
 - Second Screen will be the CMS Case file open. (See figure 2 below)

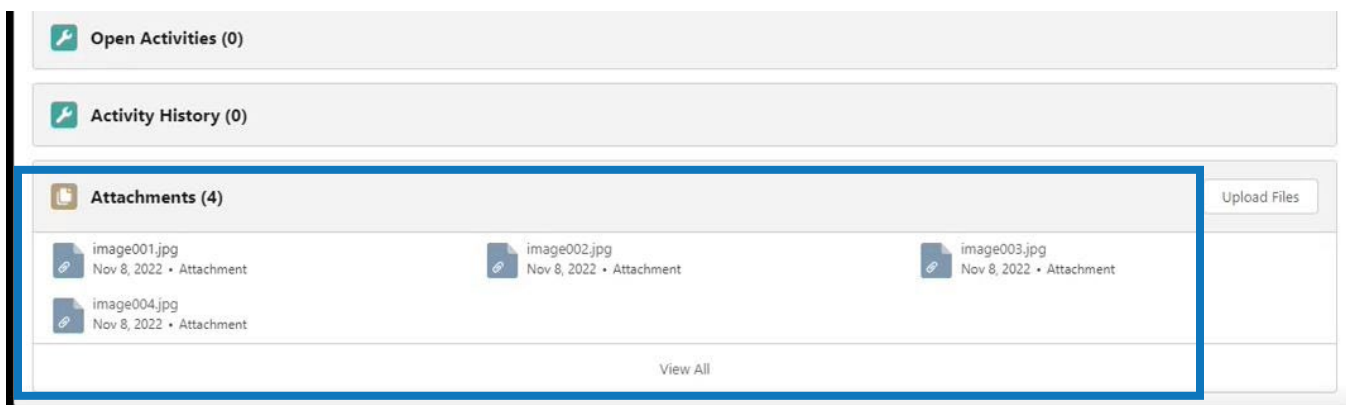


(Fig.1)



(Fig.2)

8. You will need to scroll all the way to the bottom to see the attached documents and upload them to current claim.



9. If the oldest file is from Web Claims, you are to process as normal by following [SOP: How to start a claim or Pre-claim](#).

10. If you have pulled a file from the Estimates. You are to:

- Key in parts per [Parts Verification SOP](#)
- Key in labor per [Labor Verification SOP](#)

11. Once you have the full estimates keyed in you are to task the adjuster assigned to the claim. Then update file status tracking bar to **[Closed]** and click **[Mark Status]** to save the file.



Approval & Revision

Date Created 11/16/2022	Created By Johnnie Martinez	Date Approved 11/16/2022	Approved By Jason Dolan	
Date Revised 11/17/2022	Revised by Johnnie Martinez	Revision Description Added attachment step#8	Date Approved 11/17/0222	Approved By Jason Dolan
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]